

Metal Engineering Textbook

Bearbeitet von

Josef Dillinger, Walter Escherich, Werner Günter, Eckhard Ignatowitz, Dorothea Jeub-Bartenschlager,
Stefan Oesterle, Ludwig Reißler, Andreas Stephan, Reinhard Vetter, Falko Wieneke

1. Auflage 2016. Taschenbuch. ca. 680 S. Paperback

ISBN 978 3 8085 1243 2

Format (B x L): 17 x 24 cm

Gewicht: 1145 g

schnell und portofrei erhältlich bei


beck-shop.de
DIE FACHBUCHHANDLUNG

Die Online-Fachbuchhandlung beck-shop.de ist spezialisiert auf Fachbücher, insbesondere Recht, Steuern und Wirtschaft. Im Sortiment finden Sie alle Medien (Bücher, Zeitschriften, CDs, eBooks, etc.) aller Verlage. Ergänzt wird das Programm durch Services wie Neuerscheinungsdienst oder Zusammenstellungen von Büchern zu Sonderpreisen. Der Shop führt mehr als 8 Millionen Produkte.



EUROPEAN TEXTBOOK SERIES
for professions in the metal industry

Jörg Bartenschlager
Josef Dillinger
Walter Escherich
Werner Günter
Dr Eckhard Ignatowitz

Stefan Oesterle
Ludwig Reißler
Andreas Stephan
Reinhard Vetter
Falko Wieneke

Metal Engineering Textbook

1st English edition

VERLAG EUROPA-LEHRMITTEL · Nourney, Vollmer GmbH & Co. KG
Düsselberger Straße 23 · 42781 Haan-Gruiten, Germany

Europa no.: 12432

Original title:

Fachkunde Metall, 57th edition, 2013

Authors:

Bartenschlager, Jörg	Oberstudienrat	Rheinbreitbach
Dillinger, Josef	Studiendirektor	Munich
Escherich, Walter	Studiendirektor	Munich
Günter, Werner	Dipl.-Ing. (FH)	Oberwolfach
Ignatowitz, Dr Eckhard	Dr.-Ing.	Waldbronn
Oesterle, Stefan	Dipl.-Ing.	Amtzell
Reißler, Ludwig	Studiendirektor	Munich
Stephan, Andreas	Dipl.-Ing. (FH)	Kressbronn
Vetter, Reinhard	Oberstudiendirektor	Ottobeuren
Wieneke, Falko	Dipl.-Ing.	Essen

The authors are specialist teachers for technical training courses and engineers.

Editor:

Josef Dillinger

Photos:

Kindly provided by the companies mentioned in the directory starting from page 664

Graphic design:

Design office of Verlag Europa-Lehrmittel, Ostfildern, Germany

Translation of the “Review” chapters: Senior Teacher Christina Murphy, Wolfratshausen, Germany

1st edition 2016

Impression 6 5 4 3 2 1

All impressions of the same edition can be used in parallel, as they do not differ from each other except with regard to the correction of printing errors.

ISBN 978-3-8085-1243-2

Cover design: MediaCreativ, G. Kuhl, Hilden, Germany, using a photo provided by TESA/Brown & Sharpe, Rensens, Switzerland

All rights reserved. This work is copyright protected. Any use other than that specified by law must obtain written approval from the publisher.

© 2016 by Verlag Europa-Lehrmittel, Nourney, Vollmer GmbH & Co. KG, 42781 Haan-Gruiten, Germany
<http://www.europa-lehrmittel.de>

Translation and typesetting: A.C.T. Fachübersetzungen GmbH, Mönchengladbach, Germany

Printing: B.O.S.S. Medien GmbH, Goch, Germany

Preface

METAL ENGINEERING TEXTBOOK is the first English edition of "Fachkunde Metall" (57th edition). Fachkunde Metall is the leading textbook for metalworking in Germany, a country that boasts a highly developed metalworking industry and a world renowned dual training system. For years, the textbook has been implemented in a wide range of applications in vocational schools within programs geared towards jobs in the metalworking trade.

METAL ENGINEERING TEXTBOOK encompasses the fundamentals of the entire professional field of metal technology and expert knowledge pertaining to jobs within the fields of mechanical, metal cutting and automation technology. METAL ENGINEERING TEXTBOOK has an extensive spectrum of application in on-the-job training and continuing education for apprentices, foremen and technicians in businesses within the metalworking industry.

For students of the various specialist fields of engineering studies, it offers a comprehensive introduction. Together with the reference book MECHANICAL AND METAL TRADES HANDBOOK published by Europa-Lehrmittel it serves as an invaluable source of information and reference also for students doing their professional traineeship and those in their first semesters of study.

Target groups

- Industrial mechanics
- Precision mechanics
- Production mechanics
- Cutting machine operators
- Technical product designers
- Foremen and technicians
- Trainees in the metal-processing industry and in trade
- Technical school students
- Trainees and students in the subject of mechanical engineering

METAL ENGINEERING TEXTBOOK assists users in their qualified vocational endeavours. The information available in the form of text and illustrations helps students hone and broaden their skills in the areas of independent planning, performance and supervision. The authors have placed special importance on application and problem orientation in order to make the scientific-technical operating principles and their context within the production process more accessible to students. The scientific-technical and trade-relevant mathematical foundations are incorporated in certain topic segments so as to provide a clearer understanding of the context.

METAL ENGINEERING TEXTBOOK follows the norms DIN, DIN EN and DIN EN ISO applicable in Germany. Please keep in mind that these norms vary in countries in which other national norms apply.

The authors and the publisher are grateful to all users of METAL ENGINEERING TEXTBOOK for critical information and suggestions for improvement (lektorat@europa-lehrmittel.de).

1 Inspection technology 2 Quality management 12 ... 87	
--	--

3 Production engineering 88 ... 259	
---	--

4 Materials science 260 ... 340	
---	--

5 Mechanical engineering 6 Electrical engineering 341 ... 436	
---	--

7 Assembly, commissioning, maintenance 437 ... 475	
--	--

8 Automation technology 476 ... 562	
---	--

9 Automated manufacturing 10 Technical projects 11 Projects 563 ... 663 Appendix	
--	--

Subject guide

The content of "Metal Engineering Textbook" is logically structured to give teachers and students maximum educational and methodological freedom. The structure of the topics selected in the book aims to allow students to independently familiarise themselves with the different technical content required in the subject areas.

The following selection shows the allocation of the chapters and the content in the textbook to the individual subject areas. It is provided as a suggestion and guideline in order to hold lessons that target the subject areas.

Subject area	Factual information in the book (examples)
<p>Manufacturing components using hand-held tools Preparing and manufacturing components typical of the profession using hand-held tools. Creating and modifying drawings for simple components.</p> <p>Planning work steps with tools and materials and performing calculations. Selecting and using appropriate measuring instruments and recording the results. Roughly estimating production costs.</p> <p>Documenting and presenting work results.</p> <p>Complying with health and safety and environmental protection regulations.</p>	<p>Project: Key job 638</p> <p>3.6.2 Manufacturing with handheld tools</p> <p>1.2 Principles of metrology 1.2.1 Basic terms 1.2.2 Errors of measurement 1.2.3 Measuring equipment capability and inspection of measuring instruments</p> <p>1.3 Length-measuring devices</p> <p>1.5 Tolerances and fits</p> <p>2.7.1 Inspection planning</p> <p>3.2 Structure of manufacturing processes</p> <p>3.4.1 Material behaviour during forming</p> <p>3.4.2 Forming processes</p> <p>3.4.3 Bend forming</p> <p>3.5 Cutting 3.5.1 Shear cutting</p> <p>4.1 General survey of materials and process materials</p> <p>4.2 Material selection and properties</p> <p>4.4 Steels and iron casting alloys</p> <p>4.5 Non-ferrous metals</p> <p>4.9 Plastics</p> <p>4.10 Composite materials</p> <p>10.5 Documenting technical projects</p> <p>3.1 Safety at work</p> <p>3.11 Manufacturing operations and environmental protection</p> <p>4.12 Environmental issues of materials and process materials</p>
<p>Manufacturing components using machines</p> <p>Evaluating drawings and part lists. Selecting materials based on specific properties. Planning production sequences using calculations.</p> <p>Construction and mode of action of machines. Using tools.</p> <p>Selecting and using measuring instruments.</p>	<p>Project: Clamp for round workpieces 640</p> <p>5.6 Drive units</p> <p>5.5 Functional units for power transmission</p> <p>1.4 Surface testing</p> <p>1.5 Tolerances and fits</p> <p>3.7 Manufacturing with machine tools</p> <p>3.8 Joining</p> <p>4.4 Steels and iron casting alloys</p> <p>5.6 Drive units</p> <p>5.5 Functional units for power transmission</p> <p>5.1 Classifying machines</p> <p>5.2 Functional units of machines and devices</p> <p>3.7.1 Cutting materials</p> <p>1.2 Principles of metrology</p> <p>1.2.1 Basic terms</p>

Subject area	Factual information in the book (examples)
	1.2.2 Errors of measurement 1.2.3 Measuring equipment capability and inspection of measuring instruments 1.3 Length-measuring devices 2 Quality management 2.3 Quality requirements 2.4 Quality features and defects 2.7.1 Inspection planning
Documenting and presenting work results.	10.5 Documenting technical projects
Complying with health and safety and environmental protection regulations.	3.1 Safety at work 3.11 Manufacturing operations and environmental protection 4.12 Environmental issues of materials and process materials
<hr/>	
Manufacturing simple components	Project: Drill stands for hand drills 642
Reading and understanding assembly drawings and circuit diagrams. Planning simple controls. Assembling components. Marking parts in compliance with standards.	5.1 Classifying machines 5.4 Functional units for bracing and support 5.6 Drive units 5.5 Functional units for power transmission 8.3.3 Circuit diagrams for pneumatic controls 8.3.4 Systematic designing of circuit diagrams 8.3.5 Examples of pneumatic controls
Distinguishing joining techniques. Selecting tools and standard parts.	3.8 Joining 4.4 Steels and iron casting alloys
Documenting and presenting work results.	2 Quality management 2.1 Scope of QM 2.2 The DIN EN ISO 9000 series of standards 2.3 Quality requirements 2.4 Quality features and defects 10.1.1 Work organisation for the line and project 10.5.1 Word processing 10.5.2 Spreadsheet 10.5.3 Presentation software 10.5.4 Technical communication
Complying with health and safety and environmental protection regulations.	3.1 Safety at work 3.11 Manufacturing operations and environmental protection 4.12 Environmental issues of materials and process materials
<hr/>	
Maintaining technical systems	Project: Maintaining an upright drilling machine ... 644
Evaluating the service and maintenance measures.	1 Inspection technology 1.1 Quantities and units 7.3 Maintenance 7.4 Corrosion and corrosion protection 7.5 Failure analysis and failure prevention 7.6 Load and strength of parts
Planning maintenance activities, determining tools and process materials.	4.1.3 Process materials and energy 5.6 Drive units 5.5 Functional units for power transmission 7.3.6 Inspection 7.3.7 Repair
Documenting and presenting work results.	10.5 Documenting technical projects
Complying with health and safety and environmental protection regulations.	3.1 Safety at work 3.11 Manufacturing operations and environmental protection 4.12 Environmental issues of materials and process materials

Subject area	Factual information in the book (examples)
Manufacturing individual parts using machine tools	Project: Hydraulic clamping fixture 646
Manufacturing workpieces made from various materials on machine tools.	3.7 Manufacturing with machine tools 4.4.3 The designation system for steels 2.4 Quality features and defects 2.7.1 Inspection planning
Selecting appropriate manufacturing processes and clamps for tools and workpieces.	1.2 Principles of metrology 1.3 Length-measuring devices 1.4 Surface testing 1.5 Tolerances and fits 1.6 Checking of form and positions
Annealing, hardening, quenching and tempering.	4.4 Steels and iron casting alloys 2.4 Quality features and defects
Developing inspection plans based on quality management.	2.7.1 Inspection planning 4.8 Heat treatment of steels
Installing and commissioning control systems	Project: Separating and identifying different metal balls 648
Installing and starting up control systems.	5.1 Classifying machines 10.3 Develop a project in phases using the hoist as an example project
Identifying components and functional processes from controls in different equipment technology. Construction and commissioning of various controls.	5.6 Drive units 8.2 Principles and basic elements of controls 8.3 Pneumatic controls 8.4 Electropneumatic controls 8.5 Hydraulic controls
Assembling technical systems	Project: Bevel gear 650
Planning the assembly of technical subsystems and preparing assembly plans. Assembling components.	1.5 Tolerances and fits 1.6 Checking of form and positions 3.8 Joining 5.4 Functional units for bracing and support
Performing function controls and preparing inspection records. Strength properties.	4.11 Material testing
Documenting and presenting work results.	10.5 Documenting technical projects
Programming and manufacturing on numerically controlled machine tools	Project: Gear shaft and bearing cap 652
Manufacturing components on numerically controlled machine tools. Preparing work and tool plans.	9.1 Computerised numerical controls 9.1.2 Coordinates, zero and reference points 9.1.3 Control modes, corrections 9.1.4 Creating CNC programs 9.1.5 Cycles and subroutines 9.1.6 Programming CNC lathes 9.1.7 Programming CNC milling machines 9.2 Automatic manufacturing equipment 2.3 Quality requirements 2.4 Quality features and defects
Setting up the machine tool. Developing CNC programs.	9.1.2 Coordinates, zero and reference points 9.1.3 Control modes, corrections 9.1.4 Creating CNC programs 9.1.5 Cycles and subroutines 9.1.6 Programming CNC lathes 9.1.7 Programming CNC milling machines
Developing inspection plans based on quality management.	2.7.1 Inspection planning 1.2 Principles of metrology 1.4 Surface testing 1.5 Tolerances and fits 1.6 Checking of form and positions

Subject area	Factual information in the book (examples)
Repairing technical systems	Project: Motor spindle of a CNC milling machine . . . 654
Planning repair measures.	7.5 Failure analysis and failure prevention
	7.6 Load and strength of parts
	3.8 Joining
Dismantling subsystems.	4.8 Heat treatment of steels
Analysing and documenting defects.	4.11 Material testing
	5.4.1 Friction and lubricants
	7.3.6 Inspection
	7.3.8 Improvements
	7.3.9 Locating sources of faults and errors
Replacing and assembling defective components.	10.5 Documenting technical projects
<hr/>	
Manufacturing and commissioning technical subsystems	Project: Feed drive of a CNC milling machine 656
Describing functions relationships between devices and components.	3.7.10 Broaching
Selecting appropriate manufacturing processes and assembly equipment.	3.7.11 Precision machining
Assembling subsystems to form a complete system and commissioning.	3.8 Joining
Recording the transfer.	7.2 Commissioning
	10.5 Documenting technical projects
<hr/>	
Monitoring product and process quality	Project: Spirit level 658
Performing machine and process capability inspections.	2.5 Quality management tools
Recording process data and evaluating parameters.	2.6 Quality control
Distinguishing between systematic and random influencing variables.	2.7 Quality assurance
Monitoring the production process in mass and series production using quality assurance methods, documenting the progress and identifying corrective measures.	2.8 Machine capability
	2.9 Process capability
	2.10 Statistical process control with quality control cards
	2.12 Continuous improvement process
	10.5 Documenting technical projects
<hr/>	
Maintaining technical systems	Project: Bottling plant 660
Maintaining technical systems.	2.12 Continuous improvement process
Investigating causes of defects.	2.5 Quality management tools
Performing weakness analyses and selecting appropriate inspection processes and measuring instruments.	7.3 Maintenance
	7.5 Failure analysis and failure prevention
	7.6 Load and strength of parts
	7.2.3 Acceptance of machinery or equipment
	10.3.3.1 Plan the project organisation
Transferring technical systems.	10.3.5 Completion and closing of the project
<hr/>	
Ensuring the operability of automatic systems	Project: Automating a manual workplace 662
Analysing and ensuring the operability of automatic systems.	2.12 Continuous improvement process
Eliminating operating faults, developing fault isolation strategies and optimising processes.	8.6 Programmable logic controls
Complying with occupational health and safety when working with manufacturing and handling systems.	8.7 Handling technology in automation
	10.3.2 The definition phase
	10.3.3.1 Plan the project organisation
	10.3.5 Completion and closing of the project

Table of contents

1 Inspection technology	
1.1 Quantities and units	13
1.2 Principles of metrology	15
1.2.1 Basic terms	15
1.2.2 Errors of measurement	18
1.2.3 Measuring equipment capability and inspection of measuring instruments	21
1.3 Length-measuring devices	23
1.3.1 Scales, rulers, squares, gauges and gauge blocks	23
1.3.2 Mechanical and electronic measuring devices	26
1.3.3 Pneumatic measuring devices	34
1.3.4 Electronic measuring devices	36
1.3.5 Optoelectronic measuring devices	37
1.3.6 Multisensorics in coordinate gauging devices	39
1.4 Surface testing	41
1.4.1 Surface profiles	41
1.4.2 Surface characteristics	42
1.4.3 Surface test methods	43
1.5 Tolerances and fits	45
1.5.1 Tolerances	45
1.5.2 Fits	49
1.6 Checking of form and position	53
1.6.1 Tolerances of form and position	53
1.6.2 Testing plane surfaces and angles	55
1.6.3 Checking of roundness, coaxiality and concentricity	58
1.6.4 Checking of screw threads	63
1.6.5 Taper verification	65
1.7 Review	66
2 Quality management	
2.1 Scope of QM	67
2.2 The DIN EN ISO 9000 series of standards	68
2.3 Quality requirements	68
2.4 Quality features and defects	69
2.5 Quality management tools	70
2.6 Quality control	73
2.7 Quality assurance	74
2.8 Machine capability	78
2.9 Process capability	81
2.10 Statistical process control with quality control cards	82
2.11 Auditing and certification	85
2.12 Continuous improvement process: employee-optimised processes	86
2.13 Review	87
3 Production engineering	
3.1 Safety at work	89
3.2 Structure of manufacturing processes	91
3.3 Casting	93
3.3.1 Moulds and patterns	93
3.3.2 Casting in lost moulds	94
3.3.3 Casting in permanent moulds	97
3.3.4 Casting materials	98
3.3.5 Casting defects	98
3.3.6 Moulding plastics	99
3.3.7 Further processing of semifinished products and finished components	104
3.4 Forming	106
3.4.1 Material behaviour during forming	106
3.4.2 Forming processes	106
3.4.3 Bend forming	107
3.4.4 Tensile-compressive forming	110
3.4.5 Compressive forming	114
3.4.6 Machines for forming	116
3.5 Cutting	117
3.5.1 Shear cutting	117
3.5.2 Beam cutting	122
3.6 Metal-cutting manufacturing	126
3.6.1 Principles	126
3.6.2 Manufacturing with handheld tools	127
3.7 Manufacturing with machine tools	131
3.7.1 Cutting materials	131
3.7.2 Cooling lubricants	135
3.7.3 Sawing	138
3.7.4 Drilling	139
3.7.5 Countersinking	148
3.7.6 Reaming	149
3.7.7 Turning	151
3.7.8 Milling	171
3.7.9 Grinding	188
3.7.10 Broaching	200
3.7.11 Precision machining	202
3.7.12 Material removal using spark erosion	208
3.7.13 Clamping fixtures and clamping elements on machine tools	212
3.7.14 Manufacturing example of a clamping claw	219
3.8 Joining	223
3.8.1 Joining methods	223
3.8.2 Press-fit and snap joints	226
3.8.3 Bonding	228
3.8.4 Soldering	230
3.8.5 Welding	236
3.9 Generative manufacturing process	249
3.9.1 Rapid prototyping	249
3.9.2 Rapid tooling	251
3.9.3 Rapid manufacturing	251
3.10 Coating	252
3.11 Manufacturing operations and environmental protection	256
3.12 Review	259

4 Materials science

4.1	General survey of materials and process materials	261	4.8.3	Microstructure and crystal lattice during heating	302
4.2	Material selection and properties	263	4.8.4	Annealing	303
4.3	Inner structure of metals	269	4.8.5	Hardening	304
4.3.1	Inner structure, properties	269	4.8.6	Quenching and tempering	308
4.3.2	Crystal lattice of metals	270	4.8.7	Case hardening	309
4.3.3	Faults in the crystal	271	4.8.8	Manufacturing example: heat treatment of a clamping jaw	312
4.3.4	Formation of the metal microstructure	271	4.9	Plastics	313
4.3.5	Structure types and material properties	272	4.9.1	Properties and use	313
4.3.6	Microstructure of pure metals and alloys	273	4.9.2	Chemical composition and production	314
4.4	Steels and iron casting alloys	274	4.9.3	Technological classification and inner structure	315
4.4.1	Extraction of pig iron	274	4.9.4	Thermoplastics	316
4.4.2	Production of steel	275	4.9.5	Thermosetting plastics	318
4.4.3	The designation system for steels	278	4.9.6	Elastomers	319
4.4.4	Steel classification by composition and grades	281	4.9.7	Characteristic values of plastics	319
4.4.5	Types of steel and their use	282	4.10	Composite materials	321
4.4.6	Steel trade types	284	4.11	Material testing	326
4.4.7	Alloying and accompanying elements in steels and iron casting alloys	285	4.11.1	Testing the machining properties	326
4.4.8	Melting iron casting alloys	286	4.11.2	Testing mechanical properties	327
4.4.9	The designation system for cast iron materials	287	4.11.3	Notched-bar impact bending test	329
4.4.10	Types of iron casting alloys	288	4.11.4	Hardness tests	330
4.5	Non-ferrous metals	291	4.11.5	Fatigue limit test	334
4.5.1	Light metals	291	4.11.6	Component working load test	335
4.5.2	Heavy metals	293	4.11.7	Non-destructive material testing	335
4.6	Sintered materials	296	4.11.8	Metallographic examinations	336
4.7	Ceramic materials	298	4.11.9	Testing the characteristic values of plastics	337
4.8	Heat treatment of steels	300	4.12	Environmental issues of materials and process materials	338
4.8.1	Microstructure types of ferrous materials	300	4.13	Review	340
4.8.2	Iron-carbon phase diagram	301			

5 Mechanical engineering

5.1	Classifying machines	342	5.4.3	Guiding mechanisms	387
5.2	Functional units of machines and devices ..	350	5.4.4	Seals	390
5.2.1	Inner structure of machines	350	5.4.5	Springs	392
5.2.2	Functional units of a CNC machine tool	352	5.5	Functional units for power transmission ..	394
5.2.3	Functional units of an air-conditioning unit	354	5.5.1	Shafts and axles	394
5.2.4	Safety equipment on machines	355	5.5.2	Couplings	396
5.3	Functional units for joining	357	5.5.3	Belt drives	401
5.3.1	Screw threads	357	5.5.4	Chain drives	403
5.3.2	Screwed connections	359	5.5.5	Gear wheel drives	405
5.3.3	Pin connections	367	5.6	Drive units	408
5.3.4	Riveted joints	369	5.6.1	Electric motors	408
5.3.5	Shaft-hub connections	371	5.6.2	Gears	415
5.4	Functional units for bracing and support ..	375	5.6.3	Linear drives	421
5.4.1	Friction and lubricants	375	5.7	Review	423
5.4.2	Bearings	378			

6 Electrical engineering

6.1	The electric circuit	424	6.7	Safety precautions for electrical machines .	433
6.2	Connection of resistors	427	6.8	Notes on handling electrical equipment ...	435
6.3	Types of current	429	6.9	Review	436
6.4	Electrical power and electrical work	430			
6.5	Overcurrent protection devices	431			
6.6	Faults in electrical systems	432			

7 Assembly, commissioning, maintenance

7.1 Assembly technology	438	7.3.5 Service.	456
7.1.1 Assembly planning	438	7.3.6 Inspection	459
7.1.2 Organisational forms during assembly	439	7.3.7 Repair	461
7.1.3 Automation of assembly	439	7.3.8 Improvements.	463
7.1.4 Assembly examples	440	7.3.9 Locating sources of faults and errors	464
7.2 Commissioning	446	7.4 Corrosion and corrosion protection	465
7.2.1 Installation of machinery or equipment	447	7.4.1 Causes of corrosion	465
7.2.2 Commissioning of machinery or equipment	448	7.4.2 Types of corrosion and their appearance.	467
7.2.3 Acceptance of machinery or equipment.	450	7.4.3 Corrosion protection measures.	468
7.3 Maintenance	451	7.5 Failure analysis and failure prevention	471
7.3.1 Areas of activity and definition	451	7.6 Load and strength of parts	473
7.3.2 Maintenance terms	452	7.7 Review.	475
7.3.3 Maintenance objectives	453		
7.3.4 Maintenance concepts	453		

8 Automation technology

8.1 Closed and open loop controlling.	477	8.5.2 Work elements and hydraulic reservoirs	527
8.1.1 Principles of open loop control engineering	477	8.5.3 Hydraulic valves	531
8.1.2 Principles of closed loop control engineering	479	8.5.4 Proportional hydraulics	535
8.2 Principles and basic elements of controls	483	8.5.5 Hydraulic circuits and accessories	537
8.2.1 Operation of controllers.	483	8.5.6 Examples of hydraulic circuits.	539
8.2.2 Control components.	484	8.6 Programmable logic controllers	542
8.3 Pneumatic controls	489	8.6.1 Programmable logic controller as a compact controller (logic module).	542
8.3.1 Components of pneumatic systems	489	8.6.2 Programmable logic controller as a modular automation system	545
8.3.2 Structural elements of pneumatic systems	490	8.7 Handling technology in automation.	554
8.3.3 Circuit diagrams for pneumatic controls	499	8.7.1 Handling system technology.	554
8.3.4 Systematic designing of circuit diagrams	500	8.7.2 Classification of handling systems	555
8.3.5 Examples of pneumatic controls.	504	8.7.3 Kinematics and types of industrial robots	555
8.3.6 Vacuum technology	507	8.7.4 Functional units of industrial robots.	557
8.4 Electropneumatic controls	509	8.7.5 Programming industrial robots.	557
8.4.1 Structural elements of electrical contact controls	509	8.7.6 Coordinate systems	558
8.4.2 Signal elements – sensors	512	8.7.7 Types of movements of industrial robots.	559
8.4.3 Wiring with terminal blocks.	517	8.7.8 Communication by industrial robots and peripheral equipment	560
8.4.4 Examples of electropneumatic controls.	518	8.7.9 Safety when using handling systems.	561
8.4.5 Valve terminals	523	8.8 Review	562
8.5 Hydraulic controls	524		
8.5.1 Energy supply and compressed air conditioning.	525		

9 Automated manufacturing

9.1 CNC controls	564	9.2.3 Automation of machine tools	601
9.1.1 Features of CNC machines	564	9.2.4 Levels of production line automation.	604
9.1.2 Coordinates, zero and reference points	568	9.2.5 Transport systems in automated manufacturing systems	605
9.1.3 Control modes, corrections	570	9.2.6 Information flow in automated manufacturing systems	605
9.1.4 Creating CNC programs.	573	9.2.7 Example of an automated production line for gear shafts	606
9.1.5 Cycles and subroutines	578	9.2.8 Flexibility and productivity of manufacturing systems	607
9.1.6 Programming CNC lathes	579	9.3 Review.	608
9.1.7 Programming CNC milling machines.	587		
9.1.8 Programming methods	593		
9.1.9 5-axis machining according to PAL.	595		
9.2 Automated manufacturing equipment	599		
9.2.1 Business requirements and objectives.	599		
9.2.2 Comparison: conventional production and automated production	600		

10 Technical projects

10.1 Basics of project work	609	10.3.4 The implementation phase with project execution	620
10.1.1 Work organisation for the line and project	609	10.3.5 Completion and closing of the project	622
10.1.2 The term project	609	10.4 Changed process models in project work	623
10.1.3 Technical types of projects	610	10.5 Documenting technical projects	624
10.2 Project work as a self-contained activity and systematic problem solving	610	10.5.1 Word processing	625
10.3 Develop a project in phases using the hoist as an example project	611	10.5.2 Spreadsheet	627
10.3.1 The initialisation phase	611	10.5.3 Presentation software	630
10.3.2 The definition phase	612	10.5.4 Technical communication	633
10.3.3 The planning phase with concept development	615	10.6 Review	636

11 Projects

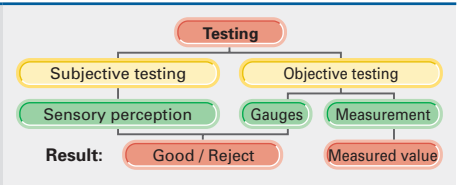
Manufacturing components using hand-held tools	638
Manufacturing components using machines	640
Manufacturing simple components	642
Maintaining technical systems	644
Manufacturing individual parts using machine tools	646
Installing and commissioning control systems	648
Assembling technical systems	650
Programming and manufacturing on numerically controlled machine tools	652
Repairing technical systems	654
Manufacturing and commissioning technical subsystems	656
Monitoring product and process quality	658
Maintaining technical systems	660
Ensuring the operability of automatic systems	662

Appendix

Company directory	664
Index	667

1 Inspection technology

1.1	Quantities and units	13
1.2	Principles of metrology	15
	Basic terms	15
	Errors of measurement	18
	Measuring equipment capability, inspection of measuring instruments	21



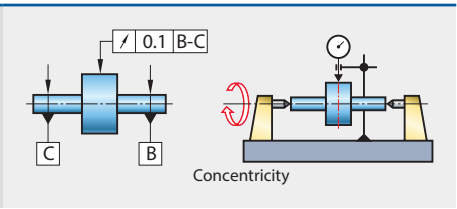
1.3	Length-measuring devices	23
	Scales, rulers, squares, gauges and gauge blocks	23
	Mechanical and electronic measuring devices ..	26
	Pneumatic and electronic measuring devices ...	34
	Optoelectronic measuring devices	37
	Multisensorics in coordinate gauging devices. ...	39



1.4	Surface testing	41
	Surface profiles	41
	Surface characteristics; surface test methods ..	42
1.5	Tolerances and fits	45
	Tolerances	45
	Fits	49

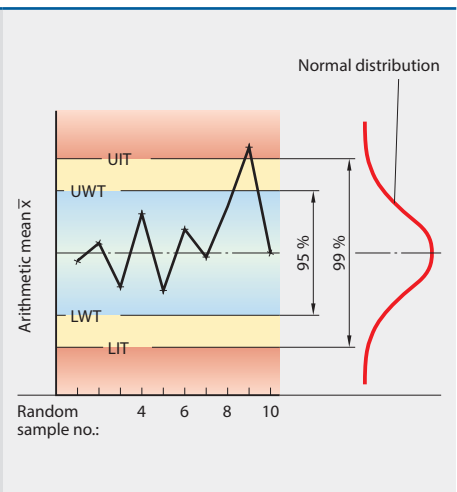


1.6	Checking of form and position	53
	Tolerances of form and position	53
	Testing plane surfaces and angles	55
	Checking of roundness, coaxiality and concentricity	58
	Checking of screw threads; taper verification ..	63
1.7	Review	66



2 Quality Management

2.1	Scope of QM	67
2.2	The DIN EN ISO 9000 series of standards. ...	68
2.3	Quality requirements	68
2.4	Quality features and defects	69
2.5	Quality management tools	70
2.6	Quality control	73
2.7	Quality assurance	74
2.8	Machine capability	78
2.9	Process capability	81
2.10	Statistical process control with quality control cards	82
2.11	Auditing and certification	85
2.12	Continuous improvement process: employee-optimised processes.	86
2.13	Review	87



1 Inspection technology

1.1 Quantities and units

Quantities describe properties, e.g. length, time, temperature or current strength (Figure 1).

Base quantities and units are defined in the International System of Units, SI, (Table 1).

Decimal multiples or decimal fractions are used to prefix the names of units, e.g. millimetres, in order to avoid the use of very large or very small numbers (Table 2).

Length

The base unit of length is the metre. One metre is the distance that light travels in a vacuum in one 299,729,458th of a second.

A few prefixes that provide information on large or small distances are useful in connection with the use of the metre unit (Table 3).

Besides the metric system, some countries still use the imperial / US inch system.

Conversion: 1 inch (in) = 25.4 mm

Angles

The units used for angles refer to central angles that are measured relative to a full circle.

One **degree** (1°) is one 360th of a full circle (Figure 2). 1° can be subdivided into minutes (') , seconds (") or into decimal fractions.

The **radian** (rad) is the angle subtended by an arc of 1 m in length for a circle with a radius of 1 m (Figure 2). One radian is equal to an angle of 57.29577951°.

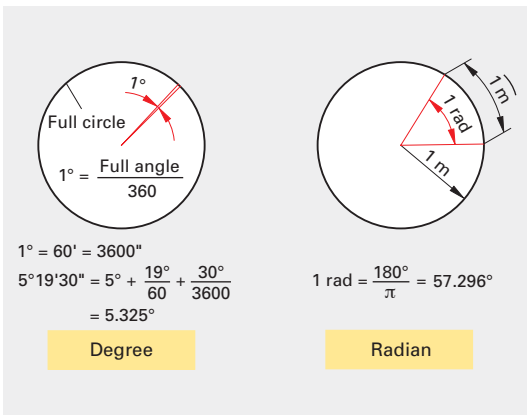


Figure 2: Angle units

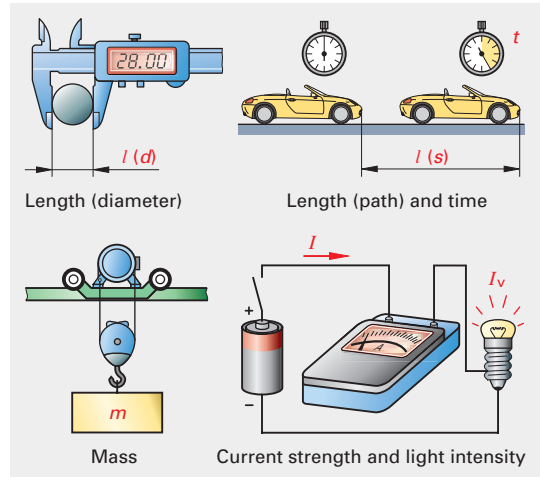


Figure 1: Basic quantities

Table 1: International System of Units

Base quantities and symbols	Base units	
	Name	Symbol
Length <i>l</i>	Metre	m
Mass <i>m</i>	Kilogram	kg
Time <i>t</i>	Second	s
Thermodynamic temperature <i>T</i>	Kelvin	K
Electrical current strength <i>I</i>	Ampere	A
Luminous intensity <i>I_v</i>	Candela	cd

Table 2: Prefixes to define decimal multiples and fractions of units

Prefix	Factor
M Mega	Millionfold $10^6 = 1,000,000$
k Kilo	Thousandfold $10^3 = 1,000$
h Hecto	Hundredfold $10^2 = 100$
da Deca	Tenfold $10^1 = 10$
d Deci	Tenth $10^{-1} = 0.1$
c Centi	Hundredth $10^{-2} = 0.01$
m Milli	Thousandth $10^{-3} = 0.001$
μ Micro	Millionth $10^{-6} = 0.000001$

Table 3: Conventional units of length

Metric system	
1 kilometre (km)	= 1000 m
1 decimetre (dm)	= 0.1 m
1 centimetre (cm)	= 0.01 m
1 millimetre (mm)	= 0.001 m
1 micrometer (μm)	= 0.000001 m = 0.001 mm
1 nanometre (nm)	= 0.000000001 m = 0.001 μm

■ Mass, force and pressure

The **mass** m of a solid depends on the quantity of material it contains. It is independent of the location at which the solid is located. The base unit of mass is the kilogram. Frequently used units also include the gram and the tonne: $1\text{ g} = 0.001\text{ kg}$, $1\text{ t} = 1,000\text{ kg}$.

A platinum-iridium cylinder that is stored in Paris is the international standard for the mass of 1 kg. It is the only base unit that has not been able to be defined using a natural constant.

A solid with a mass of one kilogram is pulled towards the earth (standard location Zurich) with a **force** F_W (weight force) of 9.81 N on its mount or restraint (**Figure 1**).

Pressure p refers to the force per unit area (**Figure 2**) measured in Pascal (Pa) or bar (bar).

Units: $1\text{ Pa} = 1\text{ N/m}^2 = 0.00001\text{ bar}$; $1\text{ bar} = 10^5\text{ Pa} = 10\text{ N/cm}^2$

■ Temperature

The temperature describes the thermal state of solids, liquids or gases. One **Kelvin (K)** equals $1/273.15$ of the temperature difference between absolute zero and the freezing point of water (**Figure 3**). The most common unit of temperature is the **degree Celsius (°C)**. The freezing point of water is equal to 0°C , while the boiling point of water is 100°C .

Conversion: $0^\circ\text{C} = 273.15\text{ K}$; $0\text{ K} = -273.15^\circ\text{C}$

■ Time, frequency and speed

The second (s) is defined as the base unit of **time** t .

Units: $1\text{ s} = 1,000\text{ ms}$; $1\text{ h} = 60\text{ min} = 3,600\text{ s}$

The **period** T , also referred to as the period of oscillation, is the time in seconds in which a process is regularly repeated, e.g. the full oscillation of a pendulum or the rotation of a grinding wheel (**Figure 4**).

Frequency f is the inverse of the period T ($f = 1/T$). It indicates how many processes occur every second. It is measured in $1/\text{s}$ or Hertz (Hz).

Units: $1/\text{s} = 1\text{ Hz}$; $10^3\text{ Hz} = 1\text{ kHz}$; $10^6\text{ Hz} = 1\text{ MHz}$

The **frequency of rotation** n (**speed**) is the number of rotations per second or minute.

For example: A grinding wheel with a diameter of 200 mm rotates 6,000 times in 2 minutes.
What is its speed?

Solution: Speed (frequency of rotation) $n = \frac{6,000}{2\text{ min}} = 3000/\text{min}$

■ Dimensional equations (formulae)

Formulae represent relationships between quantities.

For example: Pressure p is the force F per unit of area A .

$$p = \frac{F}{A}; \quad p = \frac{100\text{ N}}{1\text{ cm}^2} = 100 \frac{\text{N}}{\text{cm}^2} = 10\text{ bar}$$

In calculations, quantities are expressed by symbols. The value of a quantity is indicated as the product of the numerical value and the unit, e.g. $F = 100\text{ N}$ or $A = 1\text{ cm}^2$. Unit equations indicate the relationship between units, e.g. $1\text{ bar} = 10^5\text{ Pa}$.

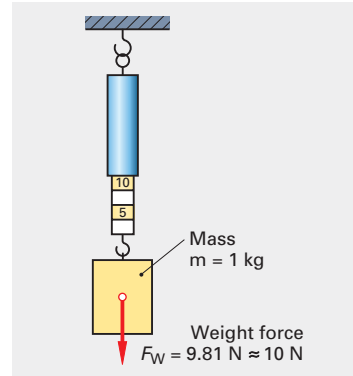


Figure 1: Mass and force

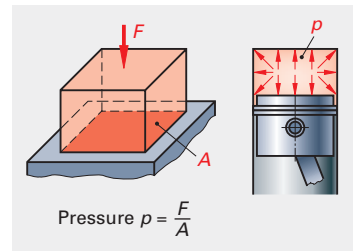


Figure 2: Pressure

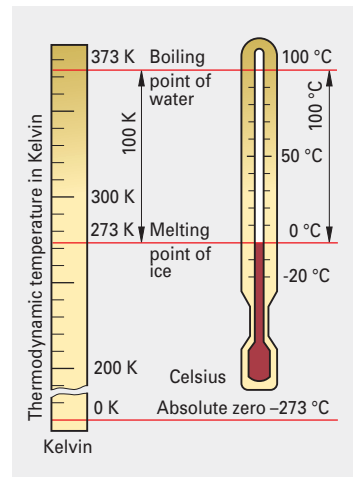


Figure 3: Temperature scales

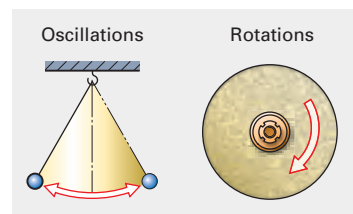


Figure 4: Periodic processes

1.2 Principles of metrology

1.2.1 Basic terms

Testing involves the comparison of actual product characteristics, such as the dimensions, form or surface quality with the required properties.

Performing tests on a test object determines whether it displays the required features, e.g. dimensions, form or surface quality.

■ Test methods

Subjective testing is performed by way of the tester's sensory perception without the use of tools (Figure 1). For example, the tester determines whether the burr formation and peak-to-valley height on the workpiece are allowable (visual and tactile inspection).

Objective testing is performed using measuring instruments, i.e. measuring devices and gauges (Figure 1 and Figure 2).

Measurement is the comparison of a length or angle using a measuring device. The result is a measured value.

Gauging is the comparison of the test object with a gauge. This does not provide a numerical value; it only determines whether the test object is OK (go) or a reject (no-go).

■ Measuring instruments

Measuring instruments are divided into three groups: **Measuring devices, gauges and tools**.

All measuring devices and gauges are based on **material measures**. They represent the measured quantity, e.g. by the spacing of dashes (graduated gauge), by the fixed distances of surfaces (gauge block, gauge) or by the angle position of surfaces (angle gauge block).

Indicating measuring devices have movable marks (pointer, vernier line), movable scales or counters. The measured value can be read directly off the device.

Gauges represent either the dimensions or the dimensions and form of the test object.

Tools include measuring stands and prisms.

■ Metrological terms

Clear basic terms are essential in order to avoid misunderstandings when describing measurement methods or evaluation procedures (tables on the following page).

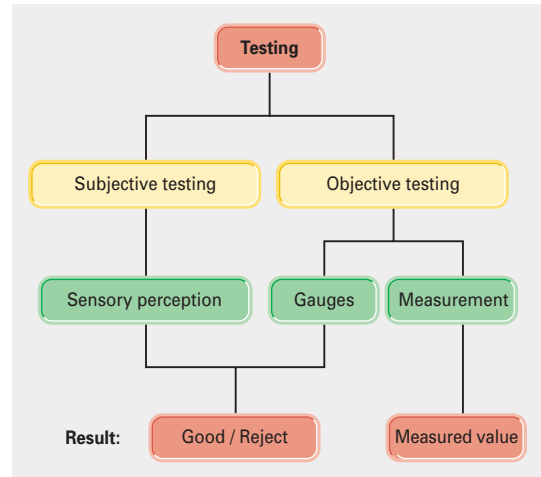


Figure 1: Test methods and test results

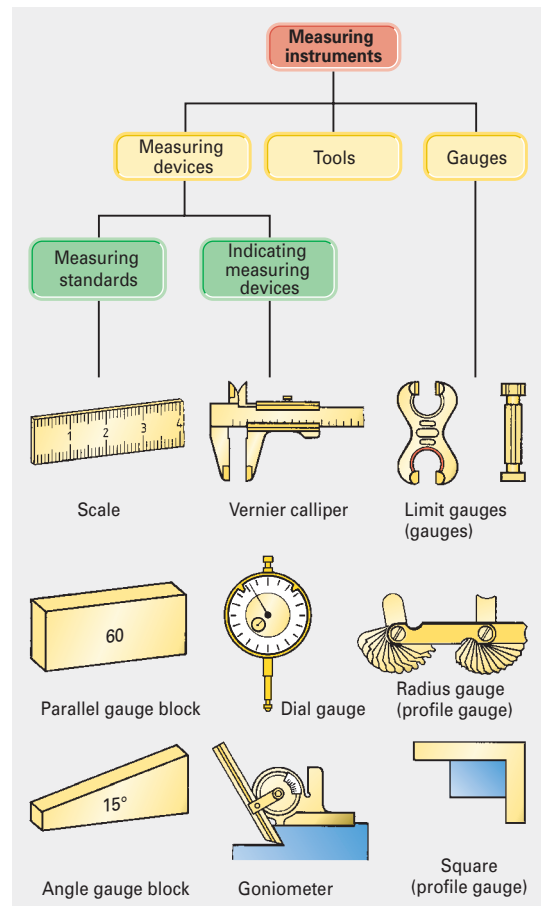





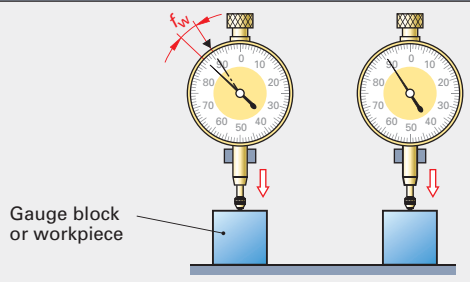
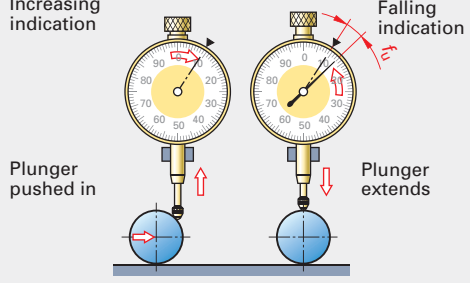
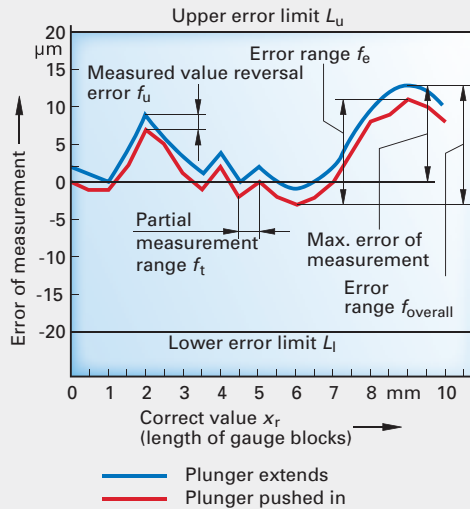
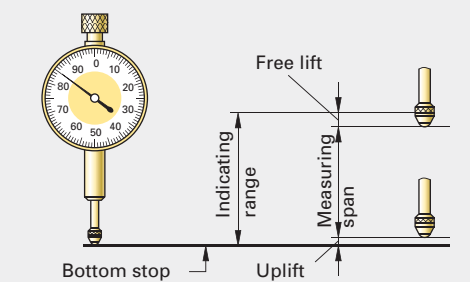
Figure 2: Measuring instruments

Table 1: Metrological terms

Term	Symbol	Definition, explanation	Example, formulae
Measured quantity	Q	The length or angle to be measured, e.g. a hole spacing or a diameter.	
Display	–	The displayed numerical value of the measured value without units (depends on the measuring range). For material measures, the inscription corresponds to the indication.	 Scale indication $GI = 0.01 \text{ mm}$  Digital indication $NI = 0.01 \text{ mm}$
Scale indication	–	Continuous indication on a line scale	
Digital indication	–	Digital indication on a numerical scale	
Graduation interval*	GI or → ←	Difference between two measured values that correspond to two consecutive graduation lines. The graduation interval GI is indicated in the scale units.	
Numerical increment	NI	The numerical increment corresponds to the graduation of a line scale.	
Displayed measured value	x_a $x_1, x_2 \dots$	Individual measured values or arithmetic means are comprised of the correct value and the random and systematic measurement errors.	
Arithmetic mean	\bar{x}	The arithmetic mean \bar{x} is generally determined from five repeated measurements.	
True value	x_w	The true value would only be obtained in the case of an ideal measurement. The true value x_w is an "estimate" determined from numerous repeated measurements and corrected for the known systematic errors.	
Correct value	x_r	In the case of material measures the correct value x_r is determined by calibration. It generally has a negligible deviation from the true value. For the case of a comparison measurement, e.g. with a gauge block, its dimension can be regarded as the correct value	
Uncorrected measuring result	x_a $x_1, x_2 \dots$ \bar{x}	Measured value of a measured quantity, e.g. an uncorrected individual measured value or a measured value determined based on repeated measurements, which has not yet been corrected for the systematic errors E_s . Single measurements are generally performed in production engineering due to the known errors from earlier measurement series or capability investigations. The measuring result remains uncertain due to the random as well as the unknown systematic errors of measurement in the case of individual measurements.	
Systematic error of measurement	E_s	An error of measurement is identified by comparing the displayed measured value x_a or the arithmetic mean \bar{x}_a with the correct value x_r (Page 20).	$E_s = x_a - x_r$ ($E_s = \bar{x}_a - x_r$)
Correction value	C	Compensation of known, systematic errors, e.g. temperature error.	$C = -E_s$ ($C = C_1 + C_2 \dots + C_n$)
Measurement uncertainty*	u	Measurement uncertainty includes all random errors as well as the unknown and uncorrected systematic errors of measurement.	
Combined standard uncertainty	u_c	Combined effect of multiple uncertainty contributions to the scatter of measured values, e.g. due to temperature, measuring equipment, tester and measurement method.	$u_c = \sqrt{u_{x_1}^2 + u_{x_2}^2 + \dots + u_{x_n}^2}$
Expanded uncertainty	U	The expanded uncertainty indicates the range $y - U$ to $y + U$ about the measuring result in which a measurement's "true value" is expected to lie.	$U = 2 \cdot u_c$ (factor 2 for a 95 % confidence level)
Corrected measuring result	y	Measured value, corrected for the known systematic errors of measurement (C – correction).	$y = x + C$ ($y = \bar{x} + C$)
Complete measuring result	Y	The measuring result Y is the true value for the measured quantity Q . It includes the expanded uncertainty U .	$Y = y \pm U$ ($Y = \bar{x} + C \pm U$)

* Characteristics of measuring devices that are indicated in the catalogues.

Table 1: Metrological terms

Term	Symbol	Definition, explanation	For example
Repeatability* Repeatability limit* (repeatability)	f_w r	Repeatability is the ability of a measuring device to achieve similar readings for no more than 5 measurements of the same measured quantity in the same direction of measurement under the same measurement conditions. The lower the scatter, the "more precise" the method of measurement. The repeatability limit is the difference for two individual measured values with a probability of 95%.	
Measured value reversal error*	f_u	The measured value reversal error of a measuring device is the difference in the reading for the same measured quantity in the case of a measurement with an increasing indication (plunger pushed in) and a measurement with a falling indication (plunger extends). The measured value reversal error can be determined by individual measurements at any values within the measuring range, or it can be taken from the error diagram.	
Error range* Overall error range	f_e $f_{overall}$	The error range f_e is the difference between the highest and lowest errors of measurement across the entire measuring range. It is determined using dial gauges and precision dial gauges when the plunger is being pushed in. The overall error range $f_{overall}$ for dial gauges is determined by performing measurements when the plunger is being pushed in and extended across the entire measuring range.	
Error limit*	L	Error limits are agreed error of measurement limits, or limits specified by the manufacturer, for the errors of measurement of a measuring device. The errors are deemed to be faults if these amounts are exceeded. If the upper and lower error limit are the same, the indicated value applies for each of the two error limits, e.g. $L_u = L_l = 20 \mu m$	
Measuring range*	Mer	The measuring range is the range of measured values in which the measuring device's error limits are not exceeded.	
Measuring span	Mes	The measuring span is the difference between the end value and the starting value of the measuring range.	
Indicating range	lr	The indicating range is the range between the largest and smallest reading.	

* Features of measuring devices that are indicated in the catalogues.

1.2.2 Errors of measurement

■ Sources of errors of measurement

(Table 1, following page)

A **deviation from the reference temperature of 20°C** always results in errors of measurement if the workpieces and the controlling measuring devices and gauges are not made from the same material and do not have the same temperature (**Figure 1**).

A change in temperature of as little as 4°C, e.g. caused by the warmth of a hand, results in a change in length of 4.6 µm in a 100 mm steel gauge block.

The workpieces, measuring devices and gauges should lie within the prescribed tolerances at the **reference temperature of 20°C**.

Changes in shape due to the measuring force occur for elastic workpieces, measuring devices and measuring stands.

The elastic bending of a measuring stand does not effect the measured value if the same measuring force is used for the measurement as is applied in the zero position with gauge blocks (**Figure 2**).

Errors of measurement are reduced if the indication of a measuring device is adjusted under the same conditions under which the workpiece is measured.

Errors of measurement due to parallax arise if readings are taken from an oblique viewing angle (**Figure 3**).

■ Types of errors

Systematic errors of measurement are caused by constant errors: temperature, measuring force, radius of the probe or imprecise scales.

Random errors of measurement cannot be determined with regard to size and direction. For example, they may be caused by unknown fluctuations in the measuring force and temperature.

Systematic errors of measurement render the measured value inaccurate. The amplitude and algebraic sign (+ or -) of the errors can be compensated if they are known.

Random errors of measurement introduce uncertainty into the measured value. Unknown random errors cannot be compensated.

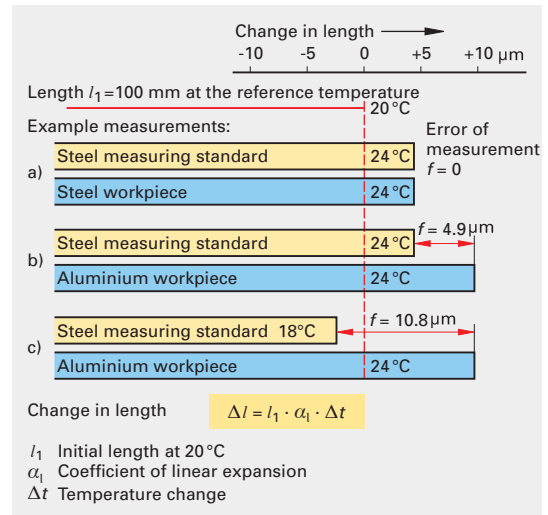


Figure 1: Errors of measurement caused by temperature

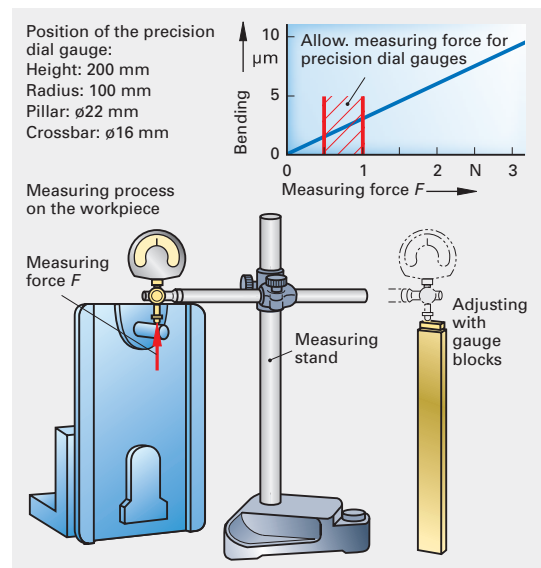


Figure 2: Errors of measurement caused by elastic changes of shape to the measuring stand due to the measuring force

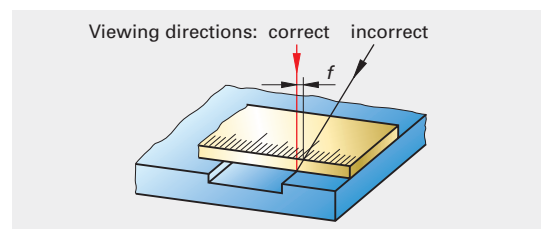
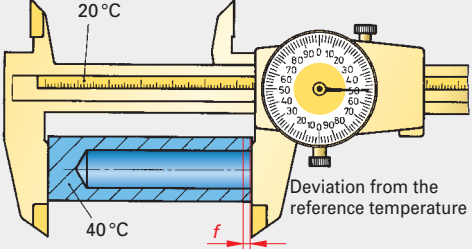
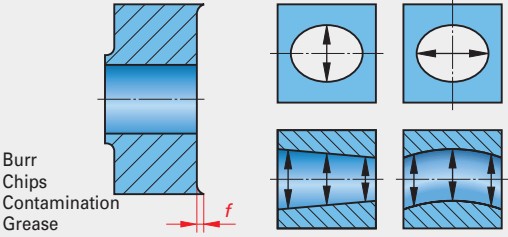
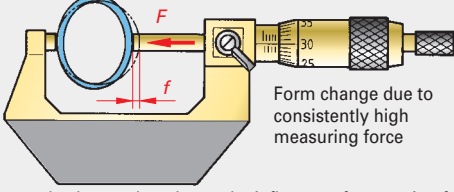
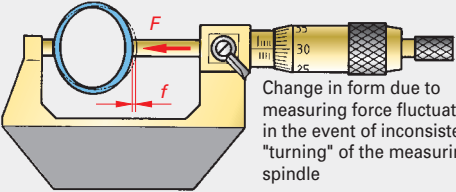
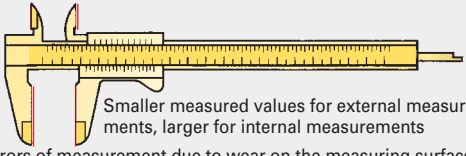
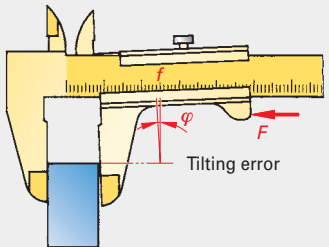
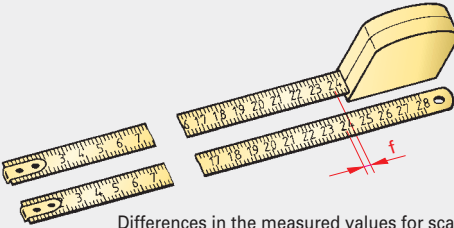
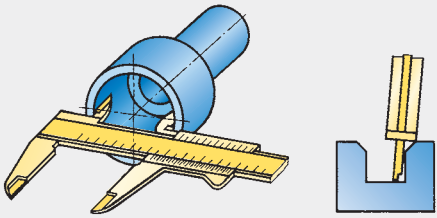
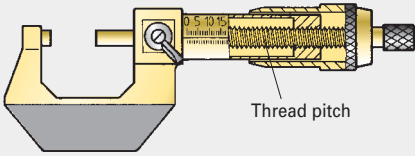
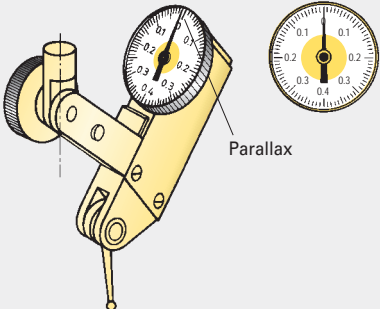
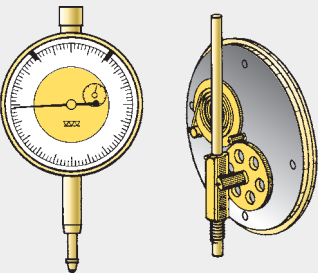


Figure 3: Error of measurement due to parallax

Table 1: Sources and types of errors of measurement

Systematic errors of measurement	Random errors of measurement
 <p>20°C 40°C Deviation from the reference temperature f</p> <p>Measured value too high due to high workpiece temperature</p>	 <p>Burr Chips Contamination Grease f</p> <p>Uncertainties due to unclean surfaces and form deviations</p>
 <p>F f</p> <p>Form change due to consistently high measuring force</p> <p>Measured value too low due to the influence of measuring force</p>	 <p>F f</p> <p>Change in form due to measuring force fluctuation in the event of inconsistent "turning" of the measuring spindle</p> <p>Scattering of the measured values due to fluctuations in the measuring force</p>
 <p>Smaller measured values for external measurements, larger for internal measurements</p> <p>Errors of measurement due to wear on the measuring surfaces</p>	 <p>f F ϕ</p> <p>Tilting error</p> <p>"Tilting error" depending on the measuring force and guide play</p>
 <p>f</p> <p>Differences in the measured values for scales</p>	 <p>Imprecise application of the vernier caliper for internal measurements</p>
 <p>Thread pitch</p> <p>Influence of pitch deviations on the measured values</p>	 <p>Parallax</p> <p>Reading error due to slanted viewing angle (parallax)</p>
 <p>Minor deviations in transmission mean that the reading deviates measurably depending on the position of the plunger</p> <p>Inconsistent transmission of the movement of the plunger</p>	

Systematic errors can be identified by a **comparison measurement** using accurate measuring devices or gauge blocks.

Using the example of testing a micrometer, the indication is compared with a gauge block (**Figure 1**). The nominal value of the gauge block (inscription) can be taken as the correct value. The systematic error E_s of an individual measured value is equal to the difference between the displayed value x_a and the correct value x_r .

Testing the errors of measurement of an outside micrometer in the measuring range between 0 mm and 25 mm results in the errors of measurement diagram (**Figure 1**). For micrometers, the comparison measurement is performed for various angles of rotation of the measuring spindle using specific gauge blocks.

Error limits and tolerances

- The error limit L must not be exceeded at any point of the measuring range.
- The standard case in metrology is symmetrical error limits. The error limits incorporate the errors of the measuring element, e.g. deviations in surface flatness.
- Compliance with the error limit L can be checked using gauge blocks of tolerance class 1 in accordance with DIN EN ISO 3650.

Systematic errors of measurement can be reduced by **zero adjustment of the display** (**Figure 2**). The zero adjustment is performed using gauge blocks that correspond to the workpiece test dimension. The random scatter can be determined by **measurements under repeat conditions** (**Figure 3**):

Working rules for measurements under repeatability conditions

- The repeated measurements of the same measured quantity on the same workpiece must be performed in succession.
- The measuring equipment, method of measurement, tester and the ambient conditions must not change during the repeat measurement.
- Measurements must always be taken at the same point if roundness deviations are not to influence the measurement scatter.

Systematic errors of measurement are identified by a comparison measurement.

Random errors can be identified by repeat measurements.

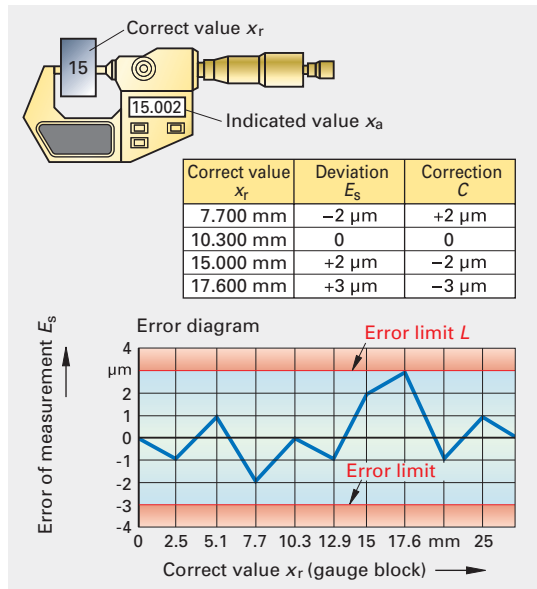


Figure 1: Systematic errors of an outside micrometer

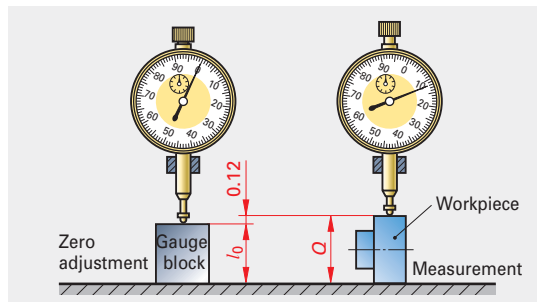


Figure 2: Zero adjustment of the indication and differential measurement

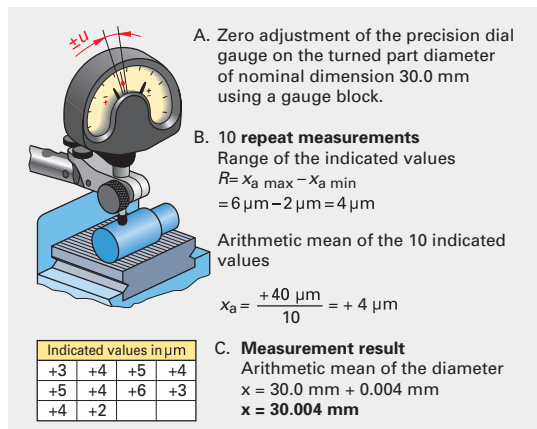


Figure 3: Random errors of a precision dial gauge for measurements under repeatability conditions